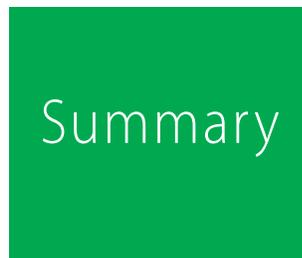




Implementation of the weighted student formula policy in San Francisco: a descriptive study of an equity-driven, student-based planning and budgeting policy





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Summary

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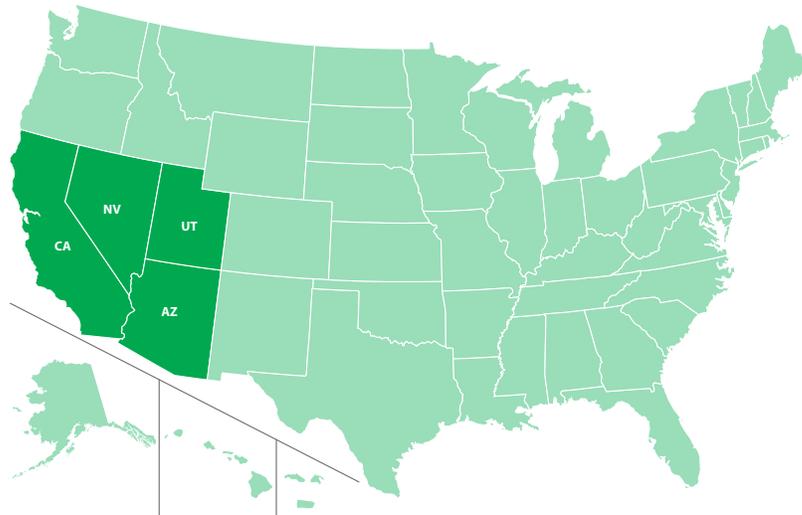
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This report is available on the regional educational laboratory web site at <http://ies.ed.gov/ncee/edlabs>.

Implementation of the weighted student formula policy in San Francisco: a descriptive study of an equity-driven, student-based planning and budgeting policy

This report describes the planning and implementation of San Francisco’s weighted student formula policy, an equity-driven student-based planning and budgeting policy. It examines one district’s policy goals, planning and implementation considerations, and how the policy interacted with other local, state, and federal policies.

A weighted student formula policy is a districtwide student-based planning and budgeting process. Replacing the traditional budgeting process that uses standardized staffing ratios to allocate resources to schools, a weighted student formula allocates resources based on differentiated student needs. Students are “weighted” according to their education needs, with more money assigned to those who traditionally need additional resources—such as low-income students, English language learner students, and students with disabilities. In addition to receiving resources based on the composition of the school student populations, schools gain budgetary and curricular autonomy.

This report explores how the San Francisco Unified School District implemented a weighted student formula policy as a pilot program in 2001/02 and then as a districtwide program in 2002/03. Revealing the complex details that a district considers when developing an equity-driven student-based planning and budgeting policy, the report shares lessons from San Francisco’s experience.

Although limited to one district, the report raises questions that might help education policymakers decide whether and how to implement a weighted student formula policy.

The report addresses the following research questions:

- What are the goals of San Francisco’s weighted student formula policy?
- What considerations did San Francisco face in planning and implementing the weighted student formula?
- How does San Francisco’s weighted student formula policy interact with other

local, state, and federal education reform policies?

- What have school and district officials learned from San Francisco’s implementation of a weighted student formula policy?
- What are the main areas for further research of weighted student formula policies?

To address these questions, researchers collected data from interviews with a small cross-section of stakeholders in the district—among them district administrators, school board members, union leaders, school principals, and school site council members—relevant district documents, and district training sessions.

Analysis of these data yielded the following findings:

- San Francisco implemented a weighted student formula policy to increase equity—by providing additional resources to students whose education often demands such resources—and to increase the effectiveness of decisionmaking—by allowing for more school-level autonomy.
- The key considerations in implementing San Francisco’s weighted student formula policy were:
 - Calculating school allocations.
 - Calculating school salaries.

- Determining school-level discretion.
- Establishing links with the academic planning process.
- Ensuring school participation.
- Ensuring district participation.
- Building school site capacity.
- Encouraging community involvement.
- Education reform programs at the local (school supervision and intervention, funding streams, labor contracts, and enrollment policies), state (categorical programs and budgetary cycles), and federal (the No Child Left Behind Act) levels affected San Francisco’s weighted student formula policy.
- The weighted student formula policy has been widely accepted among educators. However, school and district officials have learned that the policy requires more frequent and comprehensive review and that the weighted student formula policy cannot offset declining federal, state, and local school district revenues.
- Further research might explore how weighted student formula policies may burden administrators, vary in implementation in different types of district, and affect the district’s distribution of resources over time.